

City of New Orleans Bureau of Purchasing Federal Grant Procurement Procedures



CITY OF NEW ORLEANS

Version 9.1

May 16, 2022

Prepared by:
City of New Orleans
Bureau of Purchasing



Bureau of Purchasing Procurement Procedures

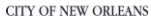
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Procurement Procedure Updates

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Overview and Purpose

This document serves as a reference document outlining the City's procurement processes. It includes procedures for projects funded by local resources, state funds, and federal grants. In particular, it provides all of the required procedures for compliance with the City of New Orleans's Federal Grant Procurement Policy for the procurement of any federally funded goods, non-professional services, professional services, or public works for the City of New Orleans.

All procurements in which federal funds are contemplated or used must be conducted in accordance with federal procurement requirements. If any conflicts exist with City of New Orleans procurement regulations, such as Chief Administrative Officer (CAO) Memorandums or Executive Orders, the federal requirements should be followed.

The Bureau of Purchasing (Purchasing) works directly with City of New Orleans (the City) departments for all procurement related activities. The requesting department is responsible for providing the justification for items submitted to Purchasing for procurement. Purchasing is responsible for maintaining all required forms and approvals for all procurements. Requesting departments may download all forms referenced in italics in this document (and listed below) from the Purchasing's Website, at <http://www.nola.gov/purchasing/>.

Section 1 of this manual aligns the methods of procurement outlined in 2 CFR 200.320 and the methods of procurement that the City follows. Section 2 outlines the specific step-by-step procedures that Purchasing follows to ensure that all procurements follow federal, state, and local guidelines.

Any interpretations, determinations or conflicts relating to the application or meaning of any of the procedures contained herein shall be made in the sole discretion of the Chief Procurement Officer (CPO), or designee. Any proposed changes to this document must be submitted in writing to and expressly approved by the CPO, or designee.

This document will be reviewed annually at a minimum to ensure continued compliance with all federal, State and local requirements.

Definitions

Public Works:

Erection, construction, alteration, improvement, or repair of any public facility or immovable property owned, used, or leased by a public entity. This definition can be found in La R.S. 348:2211(A) (12).

NOTE: Demolition of a public facility constitutes a Public Work. Debris removal is a service and not a Public Work, see City of New Orleans Policy Memorandum 113-R.

Movables (Goods):

Goods consist of "Movables" as defined in City of New Orleans Policy Memorandum 24-R.

Non-professional Services:



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While not defined, these types of services are governed by City of New Orleans Policy Memorandum 24-R

Professional Services:

Professional Services are those that include work rendered by an independent contractor who has a professed knowledge of some department of learning or science used by its practical application to the affairs of others or in the practice of an art founded on it, which independent contractor shall include but not be limited to attorneys, doctors, dentists, nurses, veterinarians, architects, engineers, land surveyors, landscape architects, accountants, actuaries, appraisers, business consultants, investment advisors, and claims adjusters. A profession is a vocation founded upon prolonged and specialized intellectual training which enables a particular service to be rendered. The word “professional” implies professed attainments in special knowledge as distinguished from mere skill. See City of New Orleans Policy Memorandum 8-R. The CPO, or designee has sole discretion to determine whether a procurement constitutes Professional Services.

Subrecipient (2 CFR 200.93):

Subrecipient means a non-Federal entity that receives a subaward from a pass-through entity to carry out part of a Federal program; but does not include an individual that is a beneficiary of such program. A subrecipient may also be a recipient of other Federal awards directly from a Federal awarding agency

Contract (2 CFR 200.22):

Contract means a legal instrument by which a non-Federal entity purchases property or services needed to carry out the project or program under a Federal award. The term as used in this part does not include a legal instrument, even if the non-Federal entity considers it a contract, when the substance of the transaction meets the definition of a Federal award or subaward

Micro and Small Purchases :

Micro and small purchases are those relatively small and simple procurements that are procured by informally soliciting quotes from vendors. These purchases must follow the procedures for small and micro-purchases, depending on their type and value. Invitation to Quote is used for small purchases of non-professional services and movables (goods), and public works.

Invitation to Quote (ITQ): An informal solicitation utilized to solicit quotes from potential suppliers of movable property and non- professional services in which an official and public communication is made to invite bidders to submit quotes by a designated day and time deadline via BRASS.

Forms

All procurement-related forms can be found on the Bureau of Purchasing’s [website](#). Depending on the funding source, requesting departments shall use the correct forms below for each specific procurement type.

Section 1: Methods of Procurement

Prohibition on Use of Geographic Preference



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The use of geographic preferences is prohibited for procurement transactions when HUD funds are utilized under 2 CFR 200.319(b). Prohibition of the use of geographic preferences is applicable for all procurement methods.

Utilizing Small Businesses, Minority Businesses, Women Business Enterprises and Labor Surplus Area Firms

The City hereby adopts the following policy applicable to all Federally funded contracts utilizing small businesses, minority-owned, women business enterprises and labor surplus area firms as required by 2 CFR 200.321.

The following steps must be taken regarding all Requests for Proposals (RFPs), Requests for Qualifications (RFQs) and Invitations to Bid (ITBs) funded by federal grant funds and issued by the City.

In an effort to assure that small and minority owned firms, women business enterprises and labor surplus area firms are solicited as potential sources for contract opportunities issued by City, all RFPs and RFQs issued must be sent to the organizations in **Appendix A**.

In addition to the above, City must take the following affirmative steps to ensure small and minority owned firms, women business enterprises, and labor surplus area firms are used when possible.

Affirmative steps must include:

- Placing qualified small and minority businesses and women's business enterprises on solicitation lists;
- Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;
- Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;
- Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;
- Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and
- Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed above.

Domestic Preferences for Procurements – CFR 200.322

The City will, as appropriate and to the extent consistent with law, to the greatest extent practicable, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirements of this section must be included in all subawards including all contracts and purchase orders for work or products under this award. For purposes of this section:

- "Produced in the United States" means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.



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- "Manufactured products" means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

1.1 Micro Purchases

According to 2 CFR 200.320(a), procurement by micro-purchase is the acquisition of supplies or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold, defined at 48 CFR Subpart 2.1, and currently set at \$3,000. To the extent practicable, the non-Federal entity must distribute micro-purchases equitably among qualified suppliers. Micro-purchases may be awarded without soliciting competitive quotations if the non-Federal entity considers the price to be reasonable.

The following outlines the methods of procurement that the City uses, which are more stringent than the requirements of 2 CFR 200.320(a):

Movables and Non-Professional Services: Micro purchases of goods and non-professional services shall include all procurements valued at \$1,000 or less. All micro purchases of goods and non-professional services may be completed upon the approval of the requesting department head, or designee after receiving at least one quote from a qualified vendor.

The department may request quotes from vendors for movables and non-professional services under \$1,000. The department must attach a copy of the quote(s), and a copy of SAM.gov showing that the vendor is not debarred. Once the requisition is submitted by the department in BRASS, a PO will be generated. No compliance approvals are required; however, Purchasing will conduct periodic audits of each department's micro purchases in BRASS to ensure compliance.

Note: Purchases may not be artificially split to avoid thresholds and/or competition. If the department has a recurring need, the items should be procured either by ITQ or by a formal procurement, as appropriate.

Professional Services: Micro purchases of professional services shall include all procurements of such services valued under \$1,000. All micro purchases of professional services may be completed upon the approval of the requesting department head, or designee.

The procedures for micro purchases of movables and non-professional services also apply to the procurement of professional services within the micro purchase threshold.

Public Works: The City shall not procure any public works regardless of value by micro purchase. All public works procurements shall be made by small purchase or formal sealed bid.

1.2 Small Purchases

According to 2 CFR 200.320(b), procurement by small purchases are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more



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than the Simplified Acquisition Threshold, defined at 48 CFR Subpart 2.1, and currently set at \$150,000.¹ If small purchase procedures are used, price or rate quotations must be obtained from an adequate number of qualified sources.

The following outlines the methods of procurement that the City uses, which are more stringent than 2 CFR 200.320(b):

Background and Overview:

A. Small Purchases of Movable and Non-Professional Services

There is a new process for procuring purchases that qualify under Invitation to Quote (ITQ) guidelines. This replaces the previous informal bid process. To qualify your purchase must be of (a) movable property or non- professional services and (b) the anticipated value must be between \$1,000.01 and \$19,999.99. Awards under ITQ are made to the lowest responsive and responsible bidder who meets the documented specifications. **Please note that if you have a repetitive procurement, meaning repeated purchases of movable property and non-professional services in a 12-month period based upon an established departmental need, you must procure through a formal sealed bid process rather than an ITQ.**

ITQs will now be compiled by departments and issued by Purchasing, via BRASS upon request from a department. Please note that the City must receive no less than three quotes in response to an ITQ, and if less than three quotes are received, it will be reposted.

All ITQ requests must be accompanied by an Intake Form, an Independent Cost Estimate (ICE), and HUD Small Purchase Checklist which can be found on Purchasing's website at <https://www.nola.gov/purchasing/forms/>.

B: Professional Services: Small purchases of professional services include procurements valued between \$1,000 and \$15,000. For all small purchases of professional services, Purchasing encourages the requesting department to obtain at least 3 proposals in writing but will accept 2 proposals. See section 2.1 for step by step procedures).

Public Works: Small purchases of public works include all public works procurements valued at \$150,000 or less. Public works procurements valued up to \$50,000 must be made utilizing the informal bid process described in Section 2.1(2)(b)(ii), which requires the City to make efforts to reach out to vendors and obtain at least 3 quotes. The requesting department must complete either the *Informal Bid Quote Form* for purchases under \$50,000 or for federal contracts, the *Small and Micro Purchase Packet*. For any construction procurements over \$2,000, the Labor Compliance Officer (LCO) will determine that proper wage rate determinations are made, in compliance with Davis-Bacon and Related Acts requirements.



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For public works valued between \$50,000 and \$150,000, the procurement is advertised on Purchasing's online portal, the requesting department completes the *Bid Procurement Authorization Form* and follows the Formal Bid Process described in Section 2.2. All public works valued above \$15,000 shall require DBE participation. Prior to the contract award, the Office of Supplier Diversity (OSD) will confirm that the City's DBE and Section 3 requirements are met.

1.3 Formal Sealed Bids

2 CFR 200.320: *Procurement by sealed bids (formal advertising). Bids are publicly solicited, and a firm fixed price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the material terms and conditions of the invitation for bids, is the lowest in price. The sealed bid method is the preferred method for procuring construction, if the conditions in paragraph (c)(1) of this section apply. The use of geographic preferences is prohibited when HUD funds are used.*

(1) *In order for sealed bidding to be feasible, the following conditions should be present:*

- (i) *A complete, adequate, and realistic specification or purchase description is available;*
- (ii) *Two or more responsible bidders are willing and able to compete effectively for the business; and*
- (iii) *The procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of price.*

(2) *If sealed bids are used, the following requirements apply:*

- (i) *Bids must be solicited from an adequate number of known suppliers, providing them sufficient response time prior to the date set for opening the bids, for local, and tribal governments, the invitation for bids must be publicly advertised;*
- (ii) *The invitation for bids, which will include any specifications and pertinent attachments, must define the items or services in order for the bidder to properly respond;*
- (iii) *All bids will be opened at the time and place prescribed in the invitation for bids, and for local and tribal governments, the bids must be opened publicly;*
- (iv) *A firm fixed price contract award will be made in writing to the lowest responsive and responsible bidder. Where specified in bidding documents, factors such as discounts, transportation cost, and life cycle costs must be considered in determining which bid is lowest. Payment discounts will only be used to determine the low bid when prior experience indicates that such discounts are usually taken advantage of; and*
- (v) *Any or all bids may be rejected if there is a sound documented reason.*

Public Works: For all public works bids over \$50,000, Purchasing follows the procedures outlined in Section 2.2 of this manual in accordance with Louisiana Public Bid Law. All requesting departments must complete the *Bid Procurement Authorization Form – Public Works* and include all front-end documentation required by Purchasing, including, but not limited, the *Cost Reasonableness Form*, and Architectural and Engineering documents and specifications. A formal list of all required front-end documentation is provided with the *Bid Procurement Authorization Form – Public Works*. The latest version of all forms may be downloaded from Purchasing's website.

Upon receipt and review of all required documentation, Purchasing shall begin the formal bid process. All Public Works bids over \$15,000 must comply with DBE participation requirements.



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Goods and Non-Professional Services: For all bids for goods and non-professional services valued at \$20,000 and above, the City utilizes a competitive bidding procurement process. Purchasing provides the requesting department with the *Bid Procurement Authorization Form- Non-Professional Services* or *Bid Procurement Authorization Form- Materials and Supplies*, and a list of the required back up documentation.

The latest version of all forms may be downloaded from Purchasing's website. The requesting department is required to complete the specification and submit to Purchasing along with all required back-up documentation. Upon receipt and review of all required documentation, Purchasing shall commence the competitive bidding process described in Section 2.2. All bids for goods and non-professional services over \$15,000 require DBE participation.

Professional Services: Professional Services valued over \$15,000 are procured through a competitive proposal process described in Section 2.3.

1.4 Procurement by Competitive Proposals

2 CFR 200.320: *The technique of competitive proposals is normally conducted with more than one source submitting an offer, and either a fixed price or cost-reimbursement type contract is awarded. It is generally used when conditions are not appropriate for the use of sealed bids. Note: geographic preferences may not be used when HUD funds are utilized. If this method is used, the following requirements apply:*

- (1) Requests for proposals must be publicized and identify all evaluation factors and their relative importance. Any response to publicized requests for proposals must be considered to the maximum extent practical;*
- (2) Proposals must be solicited from an adequate number of qualified sources;*
- (3) The Non-Federal entity must have a written method for conducting technical evaluations of the proposals received and for selecting recipients;*
- (4) Contracts must be awarded to the responsible firm whose proposal is most advantageous to the program, with price and other factors considered; and*
- (5) The Non-Federal entity may use competitive proposal procedures for qualifications-based procurement of architectural/engineering (A/E) professional services whereby competitors' qualifications are evaluated, and the most qualified competitor is selected, subject to negotiation of fair and reasonable compensation. The method, where price is not used as a selection factor, can only be used in procurement of A/E professional services. It cannot be used to purchase other types of services though A/E firms are a potential source to perform the proposed effort.*

Public Works: . All public works procurements shall be made by small purchase or a formal sealed bid.

Goods and Non-Professional Services: All procurements for goods and non-professional services shall be made by micro purchase, small purchase, or formal sealed bid.

Professional Services: Professional services over \$15,000 are procured through either an Request for Qualifications ("RFQ") and/or Request for Proposals ("RFP"). All requesting departments must use the standard *RFP/RFQ Template* provided by Purchasing. The requesting



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departments must draft an RFP or RFQ that contains clear description of the services to be performed the criteria for evaluation, and the scoring weight attached to each item. Upon review and receipt of the required documents, Purchasing shall begin the competitive proposal procedures described in Section 2.3. All professional services valued above \$15,000 require DBE participation. For procurements over \$15,000, the CPO will make a determination that the services being sought constitute professional services.

1.5 Unique or Non-Competitive

2 CFR 200.320: *Procurement by noncompetitive proposals. Procurement by noncompetitive proposals is procurement through solicitation of a proposal from only one source and may be used only when one or more of the following circumstances apply:*

- (1) The item is available only from a single source;*
- (2) The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation;*
- (3) The Federal awarding agency or pass-through entity expressly authorizes noncompetitive proposals in response to a written request from the non-Federal entity; or*
- (4) After solicitation of a number of sources, competition is determined inadequate.*

Public Works: Louisiana Public Bid Law requires that all public works valued above \$150,000 be procured via a formal sealed bid process and awarded to the lowest responsive and responsible bidder.

Goods and Non-Professional Services: Upon demonstrating that the procurement of goods and non-professional services are not amenable to competitive procurement due to unique or non-competitive circumstances, the requesting department shall submit the *Bid Procurement Authorization Form – Non-Professional Services or Bid Procurement Form Materials and Supplies*, and all additional required documents to Purchasing. The latest version of all forms may be downloaded from Purchasing's website. Upon review and receipt of all required documents, Purchasing shall commence the unique or non-competitive procurement process described in Section 2.4.

Professional Services: Except in instances of emergency or in the best interest of the City, professional services over \$15,000 must be procured through an RFQ and/or an RFP in accordance to the competitive proposal procedures described in Section 2.3. The City shall ensure that the solicitations provide clear description of the work being performed and all contractor requirements to ensure that all vendors have adequate information to submit responses.

If Purchasing receives an inadequate number of proposals, the CPO may determine whether to extend the deadline or cancel the RFP and revise or resolicit in an attempt to gather additional responses. If additional responses are received, Purchasing shall proceed with the competitive proposal procedures described in Section 2.3. If after numerous attempts, the City fails to receive additional responses, Purchasing shall determine whether to initiate the single proposal review procedures described in Section 2.3.



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1.6 Subrecipients and Partners (HUD-funding ONLY)

Under certain HUD-funded grants, the City may follow specific HUD requirements for procuring entities to aid them in their administration of the grant. These entities, known as subrecipients or partners are not required to be procured in the same ways as other firms when procured with federal funds.

Subrecipients: For HUD-funded grants, the City often relies on service providers (nonprofits and community-based organizations) and other public agencies to implement programs on their behalf with grant funds. Subrecipient and contractor definitions are included under the Definitions section of this document.

Subrecipient Selection

The selection of these organizations, known as subrecipients, are not required to comply with federal procurement requirements outlined in 2 CFR 200. Therefore, the HUD procurement checklist is not required for subrecipient agreements. Subrecipient selection procedures are under the purview of the Office of Community Development.

Subrecipient and Contractor Determinations

Prior to executing any agreement funded by HUD, the City must first make the determination as to whether the entity is a subrecipient or a contractor. The City will follow the guidance provided in **2 CFR 200.330 – Subrecipient and contractor determinations**. To help ensure correct determinations are made, Purchasing will use the Subrecipient and Contractor Determination Guide. To document this determination, a Subrecipient or Contractor Determination Checklist will be completed for all NDR agreements. A copy of the completed checklist will be included in all NDR procurement and subrecipient files. The Project Manager will be responsible for completion of the form along with section 1 of the HUD Procurement Checklist, and Purchasing and OCD compliance staff will be responsible for approval of the form.

Subrecipient Agreements

All NDR agreements must clearly indicate whether the entity is a contractor or subrecipient. Subrecipients must comply with the certain administrative requirements in 2 CFR 200, including but not limited to procurement requirements contained in 2 CFR 200.318-200.326. All subrecipient agreements must clearly indicate these requirements. Purchasing and Law have developed a HUD subrecipient agreement template containing these requirements and provisions. This template is to be utilized for all HUD-NDR subrecipient agreements.

Subrecipient Approvals

All subrecipient agreements must be reviewed and approved by Purchasing prior to execution. This requirement extends to all subsequent amendments. Additionally, Purchasing may participate in Technical Assistance for subrecipients on an as needed basis.

Procurement of Partners: For the HUD-funded National Disaster Resilience Competition (NDRC), HUD allowed grantees to engage with partners during the application process. For these purposes, partners may be a state, unit of local government, nonprofit entity, private developer, financial institution, or another entity chosen by the City to assist in applying for funding or in carrying out a funding award. Under the NDRC, partners were not required to be procured competitively.



Section 2: Purchasing Step by Step Procedures:

2.1 Small and Micro Purchases

Unless specified, all departments will follow the requirements from Section 2.1 for all small and micro purchases. For federally funded grants, specific requirements will be noted.

All ITQ requests must be accompanied by an Intake Form, an Independent Cost Estimate (ICE), and HUD Small Purchase Checklist which can be found on Purchasing's website at <https://www.nola.gov/purchasing/forms/>.

A. Movables and Non-Professional Services:

1. Preparing the ITQ and Supporting Documents – *(Responsibility – Department)*
 - a. Complete the ITQ Intake Form
 - b. Draft specification for needed item(s) including information such as quantity, size, color, any applicable minimum requirements, warranty needs, and shipping information
 1. **Note:** *Requiring a brand name product without allowing for an equivalent is prohibited. However, the use of "brand name or equal" is only appropriate in certain cases, and still requires a full description of the functional and/or performance specifications. The use of "brand name or equivalent requires approval of the Federal Procurement Compliance Officer (FCO), APA, CPO or their designee.*
 - c. Complete the following additional forms:
 - d. ICE form (obtain signatures and attached supporting documents)
 - e. HUD Small Purchase Checklist (obtain required signatures)
 - f. Once the above forms are completed, and all signatures and approvals obtained (including the Office of Community Development Grant Manager and other applicable signatures), the department submits the ITQ packet to the Federal Compliance Office (FCO) and Buyer for procurement review and approval.
 - g. FCO will sign and send the approved ITQ packet back to the department
2. Submitting the Requisition in BRASS – *(Responsibility – Department)*
 - a. The department then creates a requisition in BRASS and selects 'sourcing event'
 - b. The department attached the ITQ documents to the requisition
 1. **Note:** Be sure that each document has all required signatures before submitting
3. Procurement Compliance and Buyer Review/Approval of BRASS Req – *(Responsibility – Procurement)*
 - a. The req then is then sent through the applicable departmental and compliance approvals in the BRASS approval path.
4. Posting of ITQ and Receipt of Quotes in BRASS – *(Responsibility – Purchasing)*
 - a. Purchasing Buyer will post the ITQ for a minimum of five business days
5. Selection and Approval of Vendor – *(Responsibility – Department)*
 - a. Once quotes are received, Purchasing will tabulate all quotes submitted to the department requestor for review.
 - b. The department requester will review the tabulation and recommend an aware to Purchasing (the lowest quote must be selected)
 - c. The department then conducts a debarment check on SAM.gov and;
 - d. Completes a price analysis to confirm reasonableness and sends a copy to Purchasing



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6. Purchase Order (PO) Issue to Selected Vendor (*Responsibility – Purchasing*)
 - a. Purchasing will review the award recommendation and, assuming it meets guidelines, will award a vendor and issue a PO within approximately three business days
- B. Professional Services: Small Purchases**
 1. Prior to Requesting Quotes (*Responsibility – Department*):
 - a. The department must draft the request for quotes (Scope of Work), complete and ICE, complete the Small Purchase Professional Services Form (Purchasing will obtain the CPO signature for this form), complete and obtain signatures for the HUD Small Purchase Checklist; and submit these documents to the OCD GM for review and approval;
 - b. Upon approval the OCD GM will route the documents to Purchasing (FCO and Buyer) for review and approval;
 2. Purchasing Approval (*Responsibility -Procurement*)
 - a. Purchasing will send approval to all parties
 3. Request for Quotes/Proposals (*Responsibility – Department*)
 4. Once all approvals are received, the department may send requests for quotes in writing to at least three qualified firms;
 5. Upon receipt of the quotes, the department selects the lowest quote/proposal that meets the need and then submits to the OCD GM a packet including the following documents:
 - a. Copies the request for quotes (All quotes must be provided on the vendor's letterhead, and must state a price for the quantities requested), list of vendors contacted, copies of each response received, recommendation memo, cost or price analysis and printout from SAM. Gov showing the debarment check.
 - b. **Note:** A requesting department may only contract with a particular contractor for a total of \$15,000 per calendar year without competitive selection.

2.2 Formal Sealed Bids (Public Works, Goods, and Non-Professional Services)

1. As part of the pre-solicitation process, the requesting department completes one of the appropriate Bid Procurement Authorization Forms for the item being procured (Bid Procurement Authorization Form – Public Works, Bid Procurement Authorization Form –Non-Professional Services, or Bid Procurement Authorization Form-Materials and Supplies). If HUD funds are used, the requesting department also completes Section 1 of the *Procurement Checklist for HUD Grantees*. Note: Geographic preferences are prohibited for all solicitation types when HUD funds are used.

The requesting department must complete all required forms and submit them to Purchasing along with the *Bid Procurement Authorization Form*. The latest version of all forms may be downloaded from Purchasing's website. Failure to use the forms provided by Purchasing shall result in rejecting the proposed procurement and returning it to the requesting department for corrections. The applicable *Bid Procurement Authorization Form* must be signed by the requesting department head and CAO, or designee. The form must be provided with the formal bid package which includes, but is not limited to, the following documents:

- a. Front End Documents (not necessarily all inclusive):
 - i. Instructions to Bidders
 - ii. Form of Proposal
 - iii. Sample Agreement Form
 - iv. Bond and Certificates
 - v. Payroll Reporting



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- vi. General Conditions of the Contract
 - vii. Special Conditions for the Contract (if applicable)
 - viii. Section 3 Plans for Contractors (if HUD funded)
 - ix. Davis-Bacon Rate Determinations (if applicable)
 - x. DBE Form
 - xi. Tax Clearance Form
 - xii. General Terms and Conditions for Contracts with the City
 - b. Specifications
 - c. Completed Independent Cost Estimate (ICE Form)
 - d. Date and time of the public reading of bids
2. Use of Alternate Bids:
- a. ICE Form:
 - i. Description Section - Breakdown: Department will provide a breakdown of the base bid and alternates if designer was asked to provide estimates for alternates.
 - ii. Description Section – ICE Form will include the following statement at the bottom of the form
 - 1. The City will award the project in accordance with the budgeted amount presented by the department on the bid procurement authorization (BPA) form. If the department seeks alternates, no alternate(s) will be accepted that the budgeted amount does not allow.
 - iii. Grand Total of Estimate: the dollar amount must correspond to the total amount of base bid AND alternate(s) (if there is/are alternate(s)).
 - b. BPA and BRASS Requisition: the dollar amount for the budget presented on the BPA must match the dollar amount of the requisition in BRASS.
 - c. Post-bid Opening: if the department asks for alternate(s) with base bid, and an alternate is over the budgeted amount, the City will not accept the alternate.
 - d. Cost Reasonableness Analysis:
 - i. Budgeted Amount: the CRA will include a section entitled “Budgeted Amount” in which the department reaffirms the budgeted amount from the BPA and affirms that the City awarded the project [specify based bid only or based bid with alternate(s)] in accordance with the budgeted amount presented by the department on the BPA.
3. Purchasing Agent assigned to the procurement reviews the package and completes the *Invitation to Bid Form* sections as applicable.
4. The Purchasing Agent shall reject and return any proposals not submitted in the required template(s).
5. CPO reviews and authorizes the bid package.
6. Once approved by the CPO, Purchasing Agent, then prepares the bid package for advertisement.



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7. Public Works bids are advertised for a minimum of 28 days via Purchasing's on-line portal and in the Official Journal (newspaper) of Record.
8. Goods and non-professional services are advertised for a minimum of 21 days via Purchasing's on-line portal and in the Official Journal (newspaper) of Record.
9. Department determines whether to host a pre-bid conference. All pre-bid conferences must be held at least ten (10) days after the first newspaper advertisement is published. If a pre-bid conference is held, then Purchasing shall include sign in sheets from the pre-proposal meeting in the file.
10. Purchasing may issue any addenda up to 72 hours prior to the bid opening without having to change the opening date.
11. Purchasing may receive formal sealed bids via the following mechanisms:
 - a. Via Purchasing's on-line portal.
 - b. Delivered, in person, to the City.
 - c. Delivered via US Mail service (USPS, UPS, FedEx, etc.). Submission date and time shall be deemed by Purchasing.
12. The opening of bids occurs at the Bureau of Purchasing Office, on the date and time identified in the formal bid package.
13. Purchasing Agent completes the bid tabulation and a responsiveness review and identifies the two apparent lowest responsive bidders at the bid opening.
 - a. Within three (3) days of the bid opening, the two (2) apparent lowest bidders must submit the required DBE participation documentation and any other post-bid documentation expressly required in the Invitation to Bid and or bid specifications.
 - b. Purchasing Agent remits the DBE participation documentation to OSD. OSD reviews the said documentation to determine responsiveness and then informs the Purchasing Agent and issues the validation.
 - c. For Public Works bids, the Purchasing Agent sends the Labor Compliance Form to the requesting department's LCO who completes the form and verifies the wage rate determinations. The LCO also verifies the winning bidder's Section 3 Plan is compliant.
14. Once the lowest responsive bidder has been determined, the Purchasing Agent informs the requesting department, with a bid recommendation, which then will conduct the responsibility review.
15. The requesting department is responsible for completing their department's recommendation for award and forward that recommendation to the Purchasing Agent.
16. If HUD funding is used, Section 2 of the *Procurement Checklist for HUD Grantees* must be completed by Purchasing Agent.
17. Upon completion of the responsibility review, the requesting department shall submit a *Bid Recommendation Form* to Purchasing.
18. Based on the recommendation from the requesting department, Purchasing Agent then issues an Intent to Award (ITA) Letter to the lowest recommended responsible and responsive bidder.
19. Purchasing may disqualify bids as non-responsive for reason such as:



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- a. Bid is turned in after the date and time noted in the Invitation to Bid.
 - b. The bidder failed to provide a copy of their contractor's license on the outside of the sealed bid envelope.
 - c. The bidder failed to provide a bid bond.
 - d. The bidder failed to acknowledge any/all addenda.
 - e. The bidder failed to use the correct Unit Price Form.
 - f. The bidder failed to provide a signed corporate resolution.
 - g. The bidder failed to use blue ink on their Louisiana Public Bid Form.
 - h. The bidder, if one of the two lowest bidders, failed to provide post-bid documents or did not provide the all of the required post-bid documents.
20. Purchasing Agent will document the procurement file if the bid is rejected.
21. If HUD funded, the requesting department must submit a draft of the contract with Section 3 of the *Procurement Checklist for HUD Grantees* to the OCD Grant Manager (GM) for compliance review, including Section 3, DBE, and Davis-Bacon labor compliance. Once compliance has been confirmed, OCD GM then routes the contract to Purchasing for final approval. The contract may not be routed for signature until both approvals are received.
- NOTE: if any changes are made to the draft after approvals are received, the draft must be routed again for approval, prior to obtaining all necessary signatures.
22. The requesting department, in connection with the Law Department, shall negotiate and effectuate a contract with the awarded bidder before routing to the Mayor for signature.
23. Upon full execution of the contract, the Purchasing Agent shall issue the PO, based upon a pre-encumbered requisition in the City's financial system.
24. The requesting department shall then issue a notice to proceed.
25. If HUD funded, upon issuance of the notice to proceed, the requesting department must complete and submit Section 4 of the *Procurement Checklist for HUD Grantees*, along with a copy of the executed contract, and notice to proceed to the OCD GM for compliance review. Once compliance has been confirmed, OCD GM then routes the contract to Purchasing for final approval.
26. Purchasing Agent shall maintain all formal procurement records.

2.3 Procurement by Competitive Proposals

1. As part of the Pre-Solicitation process, and to initiate the procurement by competitive proposals, the requesting department must submit the *Request for Professional Services Form* to Purchasing, along with the following documents. If HUD funds are used, the requesting department must also submit Section 1 of the *Procurement Checklist for HUD Grantees*. Geographic preference cannot be used in solicitations utilizing HUD funds.
 - a. Completed Attachment A of the RFQ or RFP on the required Purchasing-approved template (latest version may be downloaded from Purchasing's website).
 - b. Completed RFP/RFQ Checklist (latest version may be downloaded on Purchasing's website). Note, this is a separate checklist that is required regardless of the funding source.



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- c. All evaluation criteria with their respective weights (DBE must represent at least 10% of the weighted criteria). Note, for HUD funded procurements, a geographic preference is only allowed for A/E services.
 - d. Insurance requirements from the Office of Risk Management.
 - e. Applicable and most up to date HUD provisions from OCD Compliance.
 - f. Completed ICE Form (for federal contracts)
 - g. Requesting departments are required to indicate if they would like a pre-proposal meeting.
2. If the requesting department requires a pre-proposal meeting, then Purchasing Buyer shall include minutes from the pre-proposal meeting in the file.
3. The Purchasing Buyer shall reject and return any proposals not submitted in the required template(s).
4. The Purchasing Buyer shall complete all other required parts of the RFQ/RFP template, including, but not limited to:
 - a. Standardized disclosure forms for respondents to identify any possible conflicts of interest.
 - b. Secondary disclosure forms for respondents to identify any proposed subcontractors.
5. CPO reviews and authorizes the RFP/RFQ package.
6. Upon approval from CPO, the Purchasing Buyer shall release the RFQ or RFP for advertisement. All RFQs and RFPs must be advertised for a minimum of 2 consecutive weeks via Purchasing's on-line portal and in the City's Official Journal (newspaper) of Record.
7. For RFQs and RFPs, the process is designed to maximize the number of qualified firms able to compete for the project. At a minimum, the City must obtain at least 3 proposals from qualified contractors. In the event that 3 proposals are not received, the solicitation will be let again or the CPO, or designee, must approve in writing that due to unique circumstances, it is not feasible to collect 3 proposals and that the City will proceed with the limited number of qualified firms.
8. In concert with the requesting department, CPO shall establish a Selection Committee with relevant subject matter experts. The committee must consist of 5 individuals consisting of:
 - a. The manager of the requesting department, or designee;
 - b. The CAO, or designee;
 - c. City employee who will manage and monitor the contract;
 - d. Professional from within local government who possesses expertise in the relevant field; and
 - e. The Chief Financial Officer, or designee.
9. All meetings of the Selection Committee shall be open to the public and conducted in accordance with Louisiana Open Meetings Law.
10. Prior to the Selection Committee's review, all Selection Committee members must complete a Conflict of Interest form attesting that they do not possess a conflict of interest with any of the

respondents. If a possible conflict of interest is identified, that person will not serve on the Selection Committee.

11. The Selection Committee shall first review the technical proposal and provide a rating accordingly.
12. Upon completion of the technical proposal review, the Selection Committee shall open and review the separate price proposals, if applicable.
13. The Selection Committee shall then take the proposal rating and proposed price into consideration to determine which proposal provides the best value to the city.
14. Purchasing Buyer shall then provide all proposers (selected and not selected) with written notification as to whether they were selected (Rejection and Award Letters).
15. Once the Intent to Award letter has been sent, the requesting department must obtain all documents from the selected vendor, as required in the RFP/RFQ.
16. The requesting department is responsible for completing the *Cost Reasonableness Form*, routing it for signatures, and submitting the form and supporting document to Purchasing.
17. If HUD funding is used, Section 2 of the *Procurement Checklist for HUD Grantees* must be completed by Purchasing Buyer.
18. Upon final selection by the Selection Committee, the requesting department shall begin the contracting process with the selected respondent, in accordance with City of New Orleans Policy Memorandum 8-R and 122-R.
19. If HUD funded, the requesting department must submit a draft of the contract with Section 3 of the *Procurement Checklist for HUD Grantees* to the OCD Grant Manager (GM) for compliance review, including Section 3, DBE, and Davis-Bacon labor compliance. Once compliance has been confirmed, OCD GM then routes the contract to Purchasing for final approval. The contract may not be routed for signature until both approvals are received.
20. Upon full execution by all parties, Purchasing Buyer shall issue the PO based upon a pre-encumbered requisition in the City's financial system.
21. The requesting department shall then issue a notice to proceed, if applicable.
22. If HUD funded, upon issuance of the notice to proceed, the requesting department must complete and submit Section 4 of the *Procurement Checklist for HUD Grantees*, along with a copy of the executed contract, and notice to proceed to the OCD GM for compliance review. Once compliance has been confirmed, OCD GM then routes the contract to Purchasing for final approval.
23. Purchasing Buyer shall maintain all formal procurement records.

2.4 Unique or Non-Competitive Procurement

1. As part of the solicitation process, the requesting department must submit to the CAO a request for a non-competitive procurement of goods and/or non-professional services.
2. The requesting department's request must include the following:
 - a. Completed *Bid Procurement Authorization Form – Materials and Supplies*



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- i. The type of request: Other must be selected
 - ii. CAO approval (required on the *Bid Procurement Authorization Form – Material and Supplies*).
- b. Letter from the department head requesting the non-competitive procurement that explains why the procurement is not amenable to competitive procurement and value to the City of such a procurement.
- c. Letter from the vendor describing the service, material, or good to be provided.
- d. Completed ICE Form and Cost Reasonableness Analysis Form (for federal contracts).
3. The CAO shall review all required documentation provided and approve or deny non-competitive procurement in his or her sole discretion.
4. Upon approval of non-competitive procurement, the requesting department shall either begin the contracting process, or if permitted to proceed solely with a PO, notify Purchasing to issue the PO, based upon a pre-encumbered requisition in the City's financial system.
5. If proceeding solely with under a PO, Purchasing shall provide copies of the PO delivered to the vendor and the requesting department. Purchasing shall retain one copy of the PO.
6. Upon receiving a fully executed contract or issuance of the PO, the requesting department shall issue the notice to proceed.
7. Purchasing shall maintain all formal procurement records.

2.5 Non-Responsive or Not Responsible Respondents

1. If a bidder/respondent is determined to be non-responsive or not responsible, Purchasing sends a written ITA to the winning bidder and the next highest scoring bidder. The ITA will state the reasons why the winning bidder and second highest bidder were selected.
2. For sealed bids, the winning bidder has 3 days to deliver all necessary documentation to the proper requesting department. In the event that the winning bidder is not able to produce necessary documentation, the second highest scoring bidder will be awarded the bid.
3. For Public Works only: Non-responsible bidders have 5 days after receipt of letter to request a hearing with the Administrative Hearing Officer.
4. Purchasing is prohibited to award to the next lowest bidder until hearing is completed.
5. If the lowest bidder is deemed responsible as a result of the hearing, they are awarded the bid.

2.6 Procurement Protest Procedures

1. Actual or prospective bidders and respondents capable of submitting responsive and responsible bids or proposals may protest of the form of solicitation, the content of the solicitation itself, including but not limited to the conditions, specifications and/or requirements, or the selection.
2. Selection protests may only be filed by actual bidders or respondents who would then be selected if the protest is successful.
3. All protests regarding the type of solicitation or content of the solicitation must be filed no later than 72 hours prior to the bid or proposal submission deadline. Failure to timely file such a



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protest shall constitute a waiver of all rights to challenge the type of solicitation or content of the solicitation.

4. All selection protests, including all supporting documents, must be filed no later than earlier of the close of business 15 days from the following:
 - a. The vendor knew or should have known of the factual basis for its protest; or
 - b. The City's execution of any contract arising from the selection.
5. All protests must be filed in writing and submitted to the CPO via e-mail, facsimile, mail or hand delivery.
6. All protests must include the following, at a minimum:
 - a. Identification of the solicitation at issue including any solicitation number;
 - b. The protestor's name, address, fax and telephone numbers, and e-mail address;
 - c. A description of the protestor's standing to submit the protest;
 - d. A clear and detailed statement of all legal and factual grounds for the protest, including appropriate references to the specific section of any goods or supplies;
 - e. A selection protest shall not include explanation or advocacy of any grounds for protesting the type of solicitation or content of the solicitation;
 - f. All documents, with an index, that the protestor believes necessary to assess the legal or factual basis of the protest; and
 - g. A statement of the specific relief requested.
7. Protests that fail to meet any of the above requirements may be rejected. The City shall not consider any grounds for a protest not expressly included in the protest filings.
8. The CPO shall notify the requesting department of any protests and invite the requesting department to provide a written response to the protest.
9. The CPO shall notify the selected person(s) of any selection and allow the selected person(s) the opportunity to provide a written response within five (5) calendar days of notification.
10. If the protest is DBE-related, the CPO will notify the OSD and invite OSD to provide a written response to the protest.
11. The CPO will promptly review and resolve all protests solely upon the basis of the written protest, the solicitation, selected person's response (if applicable) and any City-department responses.
12. No hearing will be provided.
13. The CPO will provide the protester, the selected person(s) (if applicable), and all involved City-departments with a written decision stating the reasons for the decision.



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2. Procurement Procedures under an Emergency Declaration by the State or Federal Government

For State-declared emergencies, the city follows procurement procedures which adhere to the tenets of competitive procurement to the extent practicable, while ensuring that the City maintains the flexibility it needs to meet the needs of the emergency.

Declared Emergencies defined within the Louisiana Homeland Security and Emergency Assistance and Disaster Act La. R.S. 29:721 et seq. confers upon the Mayor of the City of New Orleans emergency powers to deal with emergencies and disasters of unprecedented size and destructiveness resulting from terrorist events, enemy attack, sabotage, or other hostile action or from fires, flood, earthquake or other natural or manmade causes.

1. All emergency procurements of goods or services during a declared emergency require written approval by the New Orleans Office of Homeland Security and Emergency Preparedness (NOHSEP) Director and the issuance of a PO from Purchasing.
2. Normal procurement procedures outlined in this manual shall continue during emergencies subject to 2 exceptions:
 - a. NOHSEP Director and the CPO or their respective designees may waive competitive procurement requirements for movable objects. For approved non-competitive procurements, Purchasing will contact or locate an available supplier or provider and complete the transaction by PO.
 - b. Departments should follow normal competitive procurement unless it can demonstrate that a competitive market does not exist, or extreme urgency exists.
3. Emergency Professional services procurements valued above \$15,000 must be conducted with as much competition as practicable under the circumstances.
4. Procurement specifications must have the same requirements as those generally required under normal circumstances and must allow for equivalent products.
5. DBE requirements are encouraged but not required during periods of declared emergencies.
6. Requesting departments are responsible for maintaining all records related to emergency procurements, including resource requests, requests for solicitations (Attachment A), any non-competitive justifications, and vendor quotes support (requesting departments may use phone bids if applicable).
7. Any purchases made related to the declared emergency that circumvent any of the procedures outlined herein will not be considered reimbursable and the department agency or board responsible for the purchase will bear full financial responsibility from its yearly appropriation.

2.8 Debriefing Procedures

1. Debriefings of successful and unsuccessful offerors may be done in writing, or by any other method acceptable to the CPO.
2. The CPO normally chairs any debriefing session held. Individuals who conducted the evaluations and the requesting department shall provide support.
3. At a minimum, the debriefing information shall include:



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- a. A summary of the rationale for award;
 - b. For acquisitions of commercial items, the make and model of the item to be delivered by the successful offeror; and
 - c. Reasonable responses to relevant questions about whether source selection procedures contained in the solicitation, applicable regulations, and other applicable authorities were followed.
4. The debriefing shall not include point-by-point comparisons of the debriefed offeror's proposal with those of other offerors. Moreover, the debriefing shall not reveal any information concerning:
 - a. Trade secrets;
 - b. Privileged or confidential manufacturing processes and techniques
 - c. Commercial and financial information that is privileged or confidential, including cost breakdowns, profit, indirect cost rates, and similar information;
 - d. The names of individuals providing reference information about an offeror's past performance.
5. An official summary of the debriefing shall be included in the procurement file held with Purchasing.

2.9 Contract Agreements: Preparation, Management and Modifications

After contractor is selected, and Purchasing has sent the ITA, the Department is responsible for following the Law Department's procedures including use of the appropriate contract agreement template, preparation and routing procedures.

Additional requirements and approvals for HUD funded contracts:

HUD Procurement Checklist is (applicable section) completed by department. Department is responsible for routing the Checklist and required supporting documents for applicable review and approvals prior to contract execution: OCD Grant Manager, Procurement, and Law.

CNO HUD Contract Provisions must be attached to all contracts. These provisions adhere to 2 CFR 200.326 Contract Provisions and include applicable contract provisions contained Appendix II to part 200 – Required contract provisions for nonfederal entities. Law is responsible for attaching the provisions to the contract prior to execution.

Contract must clearly identify the that the entity is a contractor, include a period of performance including (effective date and term), information related to compensation, applicable scope, milestones, deliverables, and any other information necessary to monitor contractor performance.

For construction bids where Davis Bacon is applicable, a copy of the wage rate must be attached to the contract (Law).

Once all approvals are obtained, Law obtains the necessary signatures and provides a copy of the fully executed contract to the department. Once the contract is fully executed, the contractor can begin work.

Contract Management



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Under 2 CFR 200.318(b) Non-Federal entities must maintain oversight to ensure that contractors perform in accordance with the terms, conditions, and specifications of their contracts or purchase orders.

The department is responsible for all aspects of management of the contract. CNO compliance personnel from applicable departments will provide additional support to the department throughout the life of the contract. These departments include but are not limited to OCD grant, fiscal and labor compliance, procurement compliance, and Law. However, the department is responsible managing contractor performance and initiating necessary modifications. Departments are strongly encouraged to plan ahead, and coordinate with applicable compliance staff to ensure enough time is allocated to obtain all necessary compliance approvals, prior to the contract expiration.

Note: Contractors cannot conduct business with the City without a valid contract. The contractor cannot conduct work outside the contract period of performance and must perform according the terms and conditions contained in the contract. Invoices for any work that contractor completes outside the period of performance (prior to contract execution, and/or after the contract has expired) will be rejected.

All contract modifications must be executed within the contract period of performance. Expired contracts cannot be renewed, extended or otherwise amended. Retroactive amendments (backdating an amendment effective date) is prohibited. Once a contract expires, if the good or services are still needed, a new solicitation must be issued.

Contract Modifications

This section addresses requirements and prohibitions applicable to contract modifications. Each subsections addresses procedures specific to Change Orders and Amendments to professional service agreements.

2.9.1 Change Orders

2.9.2 Change Orders – Increase of Funding (Public Works only)

1. Change Order Procedures are only for Formal Bids for Public Works only. Change Orders may not be used for informal bids. If a change order is required for an informal bid, then a new bid must be issued.
 - a. The requesting department submits completed Change Order Recommendation for Approval Form or a Plan Change Recommendation for Approval Form as applicable and all supporting documents to Purchasing Buyer to commence the Change order process. Supporting documents include but are not limited to:
 - i. Completed ICE Form (for federal contracts)
 - ii. Completed Requisition by the requesting department.
 - iii. Completed Section 5 of the *Procurement Checklist for HUD Grantees* (for HUD-funded procurements)
 - b. Requesting department may use Change Order Recommendation for Approval Form or Plan Change Recommendation for Approval Form subject to the following conditions:
 - i. If the proposed change order is under \$10,000, only requesting department head is required to sign.



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- ii. If the proposed change order is \$10,000.01, then both requesting department head and CAO are required to sign.
- c. Prior to submission to Purchasing, the requesting department shall pre-encumber the value of the proposed change order as a requisition in the City's financial system.
- d. The Change Order and supporting documentation (including Section 5 of the *Procurement Checklist for HUD Grantees* and Cost Reasonableness Analysis) should be routed by the requesting department to OCD. After OCD reviews, it will route the change order to Purchasing.
- e. Upon submission to Purchasing, the assigned Purchasing Buyer shall review the Change Order Recommendation for Approval Form or Plan Change Recommendation for Approval Form and all supporting documents.
- f. The LCO shall review the change order to make a determination on whether the labor wage rates need to be adjusted, that the contract is still in accordance with the Section 3 and DBE plans.
- g. In accordance with state law, the CPO, in consultation with the requesting department, must determine whether the proposed change order is within or outside of the scope of the original procurement.
 - i. If the proposed change order is within the scope of the original procurement, then cost is negotiated with the vendor for the best interest of the public entity and Purchasing Buyer shall issue a purchase order for the approved change order.
 - ii. If the proposed change order is outside the scope of the original procurement, then the CPO shall inform the requesting department and notify them that the change order must be let out for public bid and instruct them to commence formal procurement procedures.
- h. Upon Purchasing's issuance of a PO, the requesting department shall issue the vendor a Notice to Proceed.
 - i. All change order forms and supporting documents shall be added to the procurement record.

2.9.3 Change Orders - Decreasing Funds - (Public Works only)

1. Requesting department shall submit completed Change Order Recommendation for Approval Form signed by the requesting department head, and Section 5 of the *Procurement Checklist for HUD Grantees* (if applicable) to Purchasing.
2. The assigned Purchasing Buyer shall reduce the original procurement purchase order by the amount identified in the Change Order Recommendation for Approval Form.
3. Purchasing Buyer shall then issue a revised purchase order to the vendor and requesting department.
4. All change order forms and supporting documents shall be added to the procurement record.

2.9.4 Amendments to Professional Services, Goods, and Non-Professional Services Contracts:

1. Professional Services, Goods, and Non-Professional Services agreements shall be amended via formal contract amendment.



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2. The requesting department and vendor shall negotiate all terms and conditions relating to the contract amendment.
3. Upon reaching agreement on the terms and conditions of the contract amendment, the requesting department shall commence the contract routing process and attach all required documents in the City's contracting system. Required forms include a completed ICE form (for federal contracts), cost reasonableness analysis, HUD Procurement Checklist (section 5: Contract Modifications), and all required supporting contract documents.
4. Upon submission of the contract amendment, the amendment must be approved by all identified City personnel including the CAO, CPO and Director of Finance.

The requesting department and Legal Department shall maintain copies of contracts and contract amendments thereto. Purchasing Buyer will maintain a copy of the amendment in the procurement file.



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Appendix A – Small and Minority Businesses, Women’s Business Enterprise and Labor Surplus Area Firms Contact List

Goodwork Network

Greg Duffer – Small Business Services Director

greg@goodworknetwork.org

Hispanic Chamber of Commerce of Louisiana

Mayra Pineda – President and CEO

president@hccl.biz

Women’s Business Enterprise Council South

www.wbecsouth.org

Blanca Robinson, President

blanca@wbecsouth.org

2800 Veterans Memorial Boulevard, Suite 180

Metairie, LA 70002

Phone: 504-830-0149

Legislative Black Caucus (NO PUBLISHED LIST)

www.llbc.louisiana.gov

Katrina Jackson, Chairwoman

jacksonk@legis.la.gov

Phone: 225-342-7342

New Orleans Regional Black Chamber of Commerce - NORBCC, Inc.

www.norbchamber.org

Patrice A. Williams-Smith, President/CEO

pwilliams@norbchamber.org

601 Louisiana Avenue, Suite 200

New Orleans, LA 70115

Phone: 504-948-0991

North East Louisiana African American Chamber of Commerce

Millie.atkins@centurylink.com

Millie Atkins, Economic Development Manager

100 Centurylink Drive

Monroe, LA 71203

Phone: 318-388-9000

Shreveport-Bossier African American Chamber of Commerce

www.sbaacc.org

Jonathan Reynolds, Director

info@sbaacc.org

1315 Milam St.

Shreveport, LA 71101

Phone: 318-220-9098

Greater Southwest Louisiana Black Chamber of Commerce

www.gslbcc.org

Courtney Reynolds, President

creynolds@gslbchamber.org

GSLBCC-Southern Consumers

1006 Surrey Street

Lafayette, LA 70501

Phone: 337-224-4190

Louisiana Economic Development

www.opportunitylouisiana.com/smallbusiness

Stephanie Hartman, Business Development Officer

Stephanie.hartman@la.gov



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1051 North 3rd Street
Baton Rouge, LA 70802
Phone: 225-342-5677

Louisiana Municipal Association

www.lma.org
Toye Taylor, Assistant Director
ttaylor@lma.org
700 N 10th Street
Baton Rouge, LA 70802
Phone: 225-344-5001

Department of Transportation and Development

www.dotd.louisiana.gov/ucp/
Stephanie Ducote, DOTD Program Director
Stephanie.ducote@la.gov
Post Office Box 94245

Small Business Administration

www.sba.gov/offices/district/la/new-orleans
Jo Ann Lawrence, Supervisory Business Development Specialist
jo.lawrence3@sba.gov
365 Canal St. Suite 2820
New Orleans, LA 70130
Phone: 504-589-6690

Procurement Technical Assistance Center (PTAC) Louisiana

http://www.la-ptac.org/homePage.do
Sherrie Mullins, Program Manager
sbm3321@louisiana.edu
PO Box 44172
Lafayette, LA 70504-4172
Phone: 337-482-6422

Goodwork Network

www.goodworknetwork.org
Phyllis Cassidy, Director
phyllis@goodworknetwork.org
2028 Oretha C Haley Blvd
New Orleans, LA 70113
Phone: 504-309-2073

Urban League Women's Business Resource Center

www.urbanleagueneuorleans.org
Lynnette Colin, Director
lcolin@urbanleagueneuorleans.org
3308 Tulane Avenue, Suite 301
New Orleans, LA 70119
Phone: 504-620-9647

City of New Orleans Office of Supplier Diversity

www.nola.gov/economic-development/supplier-diversity/
supplierdiversity@nola.gov
1340 Poydras Street, Suite 1000
New Orleans, LA 70112
Phone: 504 658-4200

Minority Business Development Agency

www.mbda.gov/businesscenters/neworleans
Alvin O. Williams, Project Director
awilliams@lambc.org
400 Poydras Street, Suite 1965
New Orleans, LA 70130
Phone: 504-293-0400



Bureau of Purchasing Procurement Procedures

City of Baton Rouge Purchasing Department

www.brgov.com/dept/purchase/

Patti J. Wallace CPPB Director

purchasinginfo@brgov.com

Phone: 225-389-3259

Caddo Parish Fair Share

www1.caddoschools.org/pages/fair-share1

Lisa S. Lloyd, CPPB Director - Fair Share

Caddo Parish Public Schools

1961 Midway Avenue

Shreveport, Louisiana 71108

Phone: 318-603-6481

Caddo Parish Purchasing

www.caddo.org/index.aspx?NID=213

Valarie Jamison-Gunn, Purchasing Manager

vgunn@caddo.org

505 Travis St. Suite 850

Shreveport, LA 71101

Phone: 318-226-6903 Ext. 2



Bureau of Purchasing Procurement Procedures

Baton Rouge, Louisiana 70804-9245

Phone: 225-379-1363

Small Business Administration

www.sba.gov/offices/district/la/new-orleans

Jo Ann Lawrence, Supervisory Business Development Specialist

jo.lawrence3@sba.gov

365 Canal St. Suite 2820

New Orleans, LA 70130

Phone: 504-589-6690

Procurement Technical Assistance Center (PTAC) Louisiana

<http://www.la-ptac.org/homePage.do>

Sherrie Mullins, Program Manager

sbm3321@louisiana.edu

PO Box 44172

Lafayette, LA 70504-4172

Phone: 337-482-6422

Goodwork Network

www.goodworknetwork.org

Phyllis Cassidy, Director

phyllis@goodworknetwork.org

2028 Oretha C Haley Blvd

New Orleans, LA 70113

Phone: 504-309-2073

Urban League Women's Business Resource Center

www.urbanleagueneworleans.org

Lynnette Colin, Director

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City of New Orleans Office of Supplier Diversity

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Minority Business Development Agency

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City of Baton Rouge Purchasing Department

www.brgov.com/dept/purchase/

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Caddo Parish Fair Share

www1.caddoschools.org/pages/fair-share1

Lisa S. Lloyd, CPPB Director - Fair Share

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Caddo Parish Purchasing

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Bureau of Purchasing Procurement Procedures

Shreveport Fair Share

www.shreveportla.gov/index.aspx?nid=138

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East Baton Rouge Parish School System Fair Share

www.ebrschools.org/apps/pages/index.jsp?uREC_ID=238725&type=d&pREC_ID=461001

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Southern Regional Minority Supplier Development Council

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